



Department for
Communities and
Local Government



English Housing Survey

Private Rented Sector Report, 2014-15



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Introduction and main findings

1. The English Housing Survey is a national survey of people's housing circumstances and the condition and energy efficiency of housing in England. It was first run in 2008-09. Prior to then, the survey was run as two standalone surveys: the English House Condition Survey and the Survey of English Housing.
2. This report provides findings from the 2014-15 survey. It covers the household characteristics of private renters, the type and condition of housing in the private rented sector, and how this changed in the last 20 years.

Main findings

The private rented sector has undergone rapid growth in the last 10 years, and overtook the social rented sector as the second largest sector in 2012-13. Since then, the sector has continued to grow.

- In 2014-15, 19% of all households were private renters. This equates to 4.3 million households.
- The sector increased from 11% to 18% between 2004-05 and 2012-13 and then to 19% in 2014-15. Between 1994-95 and 2004-05 the sector saw a much smaller increase, from 10% to 11%.

The private rented sector houses a greater proportion of younger people than other tenures.

- In 2014-15, 70% of private renters were aged under 45, compared with 25% of owner occupiers and 36% of social renters.
- Between 1994-95 and 2014-05, the proportion of private renters aged 25-54 increased from 56% to 72% whilst proportions of younger (16-24 years) and older (55+ years) private renters have fallen.

Private renters stayed in their accommodation for a relatively short period of time compared to other tenures.

- In 2014-15, 76% of private renters had lived at their current accommodation for less than five years compared to 20% in owner occupation and 39% in the social rented sector.

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- Private renters had, on average, lived at their current address for 4.0 years. By comparison, social renters had lived at their current address for an average of 11.4 years; owner occupiers for an average of 17.5 years.

The most common household type in the private rented sector was one person households, although there has been a decline in such households in the last 20 years.

- In 2014-15, 27% of private renters were one person households, down from 38% in 1994-95.

This decline has occurred alongside an increase in the proportion of families in the private rented sector.

- In 2014-15, about a quarter (23%) of privately renting households were couples with dependent children, up from 16% in 1994-95.
- The proportion of lone parents with dependent children also increased, from 7% to 13%, over the same 20 year period.

Private renters are less satisfied with their tenure than owner occupiers and social renters, but satisfaction has increased since 2004-05.

- In 2014-15, two thirds (65%) of private renters were satisfied with their current tenure. This compares to 98% of owner occupiers and 82% of social renters.
- Although lower than the other sectors, satisfaction with tenure has increased among private renters since 2004-05, when about half (48%) of private renters were satisfied.

Satisfaction with tenure was particularly high among older and retired private renters.

- In 2014-15, 90% of private renters aged 75 or older were satisfied with their tenure compared to 60% of those aged 35-44 years and 71% of 16-24 year olds.
- The majority of retired private renters (85%) were satisfied with their current tenure compared to 59% of unemployed private renters and 59% of private renters in part-time employment.

There has been an increase in the proportion of private renters who were charged a fee(s) on entering their current accommodation. These were sometimes hidden by the agent or landlord.

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- In 2014-15, 40% of households in the private rented sector were charged a fee on entering their current private rented sector accommodation, up from 34% in 2009-10. The average value of the fee was £223, up from £196 in 2009-10.
 - 18% of private renters said that they felt some of these upfront charges were hidden.

Most tenants paid a deposit when they moved into their accommodation and nearly two thirds of their landlords paid this into a government authorised deposit scheme.

- Three quarters (74%) of private renters paid a deposit when they moved into their accommodation and 62% of their landlords paid it into a government authorised deposit scheme.

Dwelling condition and safety in the private rented sector has improved since 1996 but remains poorer than other tenures. Due to increasing numbers in the private rented sector the number of households in poor conditions has remained similar.

- In 2014, 28% of private renters (1.2 million households) lived in dwellings that were non-decent, compared to 47% in 2006 (1.1 million).
- Compared with other tenures, the private rented sector has a higher rate of non-decency. In 2014, 18% of owner occupiers and 14% of social renters lived in dwellings that were non-decent.

Acknowledgements and further queries

3. Each year the English Housing Survey relies on the contributions of a large number of people and organisations. The Department for Communities and Local Government (DCLG) would particularly like to thank all the households who gave up their time to take part in the survey, NatGen Social Research, the Building Research Establishment (BRE) and CADS Housing Surveys, without whom the 2014-15 survey and this report, would not have been possible.
4. This report was produced by Sarah Frankenburg and Nevena Ilic at NatGen Social Research, and Helen Garret at BRE in collaboration with and DCLG.
5. If you have any queries about this report, would like any further information or have suggestions for analyses you would like to see included in future EHS reports, please contact ehs@communities.gsi.gov.uk.
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Chapter 1

Demographics

- 1.1 This chapter presents the profile of the people living in the private rented sector and how this has changed over time.

Profile of private renters

- 1.2 In 2014-15, 19% of all households were private renters. This equates to 4.3 million households. The private rented sector has increased by 82% since 2004-05 when 11% of households were private renters (2.3 million households). Between 1994-95 and 2004-05 the private rented sector saw a much smaller increase with 10% of all households in the sector in 1994-95, Annex Table 1.1.
- 1.3 In 2012-13, the private rented sector overtook the social rented sector to become the second largest tenure in England¹. Since then the sector has continued to grow, from 4.0 million households in 2012-13 to 4.3 million in 2014-15.
- 1.4 In the following sections, the demographic and economic profile of the household reference person (HRP) is explored in more detail. In the private rented sector, the HRP is the 'householder' in whose name the accommodation is rented. Where a joint tenancy agreement is in place, the HRP is the person with the highest income (see the glossary for further information).

Sex

- 1.5 In 2014-15, over half (56%) of HRPs in the private rented sector were male, Annex Table 1.2. Given the way that the HRP is defined and the fact that men have, on average, higher incomes than women, it is not surprising that there are more male than female HRPs. However, the disparity is greater in the owner occupied sector, where 63% of HRPs are male. On the other hand, over half (58%) of HRPs in the social rented² sector were female, which is likely due to the predominance of female headed lone parent households in the sector.

¹ See English Housing Survey, Headline Report 2012-13; available here: <https://www.gov.uk/government/statistics/english-housing-survey-2012-to-2013-headline-report>

² see English Housing Survey Social Rented Sector 2014-15 Annex Table 1.2

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- 1.6 About half (47%) of private rented households have a joint tenancy, most of which have a male HRP. Of the remaining tenancies, 23% were male single tenants, and 30% female single tenants, Annex Table 1.3.

Ethnicity and nationality

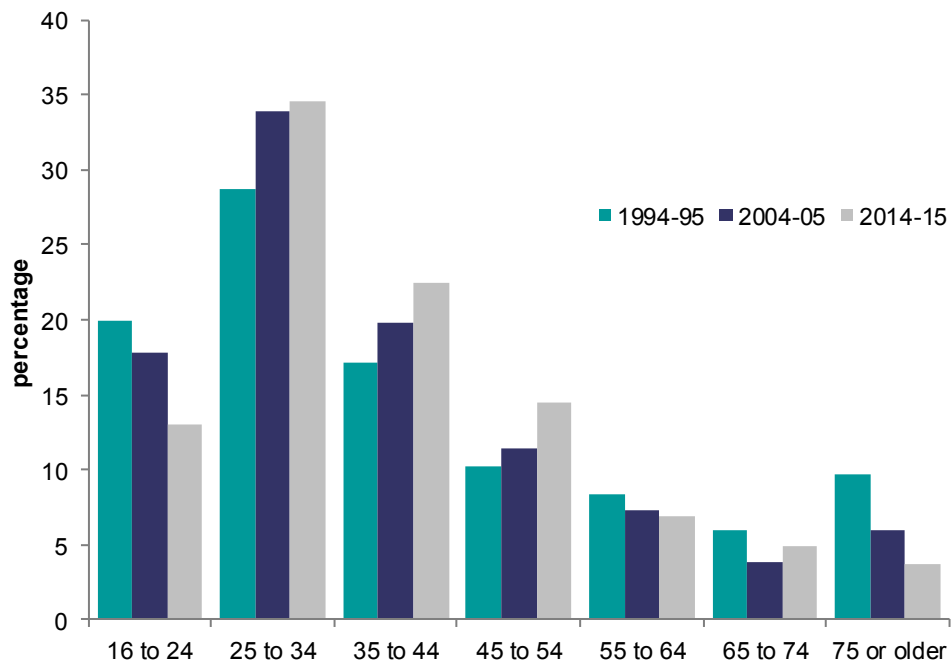
- 1.7 Over three quarters (78%) of private renters were UK or Irish nationals meaning that the private rented sector had the lowest proportion of all tenure types. In 2014-15, 96% of owner occupiers and 92% of social renters were UK or Irish nationals, Annex Table 1.4.
- 1.8 In 2014-15, 17% of HRPs in the private rented sector were from an ethnic minority background, Annex Table 1.5. Between 1994-95 and 2014-15, the private rented sector became more ethnically diverse; the proportion of ethnic minority households increased from 7% to 17%. This may be in part a reflection of a more general increase in households from ethnic minority backgrounds in England over this period: both the social rented and owner occupied sectors also saw an increase in households from ethnic minority backgrounds over this time, from 7% to 15% and 5% to 8%, respectively.

Age

- 1.9 The private rented sector has a higher proportion of younger people than other tenure types. In 2014-15, 70% of private renters were aged under 45 compared to 36% in the social sector and 25% of owner occupiers, Annex Table 1.6.
- 1.10 While about a third of owner occupiers (34%) and social renters (29%) were aged 65 or older, just 9% of private fell into this age group.
- 1.11 The proportion of younger households in the private rented sector has increased since 1994-95. The proportion of 25 to 34 year olds has increased from 29% in 1994-95 to 35% in 2014-15, Annex Table 1.2.
- 1.12 Over the same period, households with an HRP aged 35-54 increased from 27% to 37%. In contrast the proportion in the youngest group, 16-24 year olds, has decreased from 20% to 13%, Figure 1.1. This could be due to living for longer with their parents before moving into the sector³.

³ See <http://visual.ons.gov.uk/living-with-parents/>

Figure 1.1: Age of private renters, 1994-95, 2004-05 and 2014-15



Base: all private renters

Note: underlying data are presented in Annex Table 1.2

Sources:

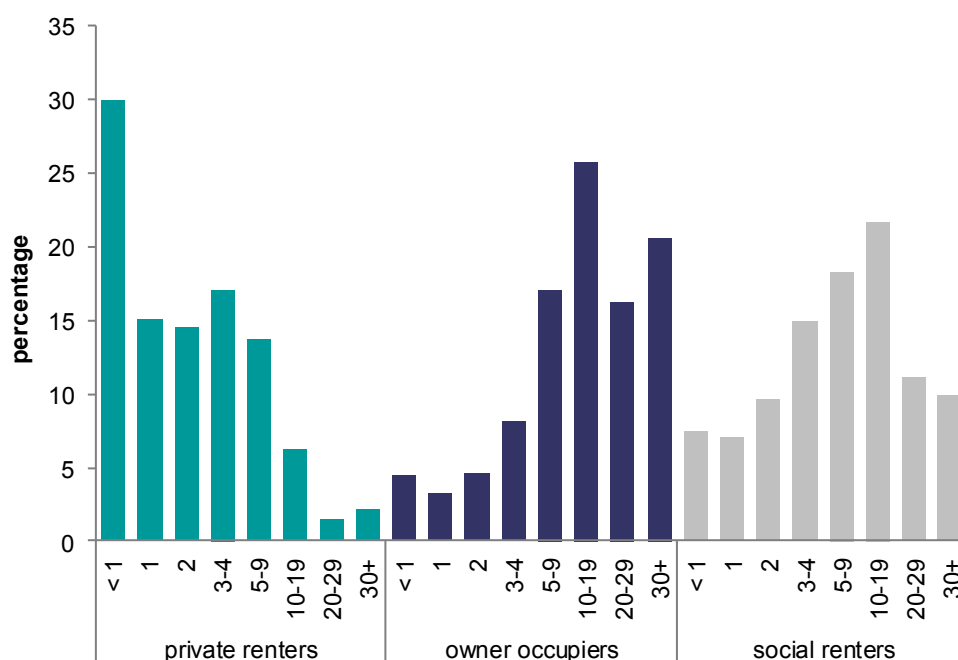
1994-95 and 2004-05: Survey of English Housing;

2014-15: English Housing Survey, full household sample

Tenancy length and length of time in tenure

1.13 People in the private rented sector are more likely to have lived at their current accommodation for a shorter period of time than both owner occupiers and social renters. In 2014-15, 76% of all private renters had lived at their current home for less than five years, and 59% for less than three years, Figure 1.2.

Figure 1.2: Length of time in current residence, by tenure, 2014-15



Base: all households

Note: underlying data are presented in Annex Table 1.7

Source: English Housing Survey, full household sample

1.14 Private renters had, on average, lived at their current address for 4.0 years. By comparison, social renters had lived at their current address for an average of 11.4 years; owner occupiers for an average of 17.5 years, Annex Table 1.7.

1.15 The English Housing Survey also asks people how long they have been renting in the private sector, not just in their current accommodation. In 2014-15, 54% of renters had been living in the private rented sector for less than five years. Nearly a quarter of all private renters had been living in the sector for between five and 10 years (24%)⁴, Annex Table 1.2.

Household size and type

1.16 In 2014-15, the most common household types in the private sector were single person households (27%) followed by couples with dependent children (23%) and couples with no children (21%), Annex Table 1.2.

1.17 The proportions of different household types in the private rented sector did not change much between 1994-95 and 2004-05 but experienced larger changes since 2004-05. The proportion of single person households in the private rented sector decreased from 35% in 2004-05 to 27% in 2014-15. The proportion of couples with no dependent children also fell.

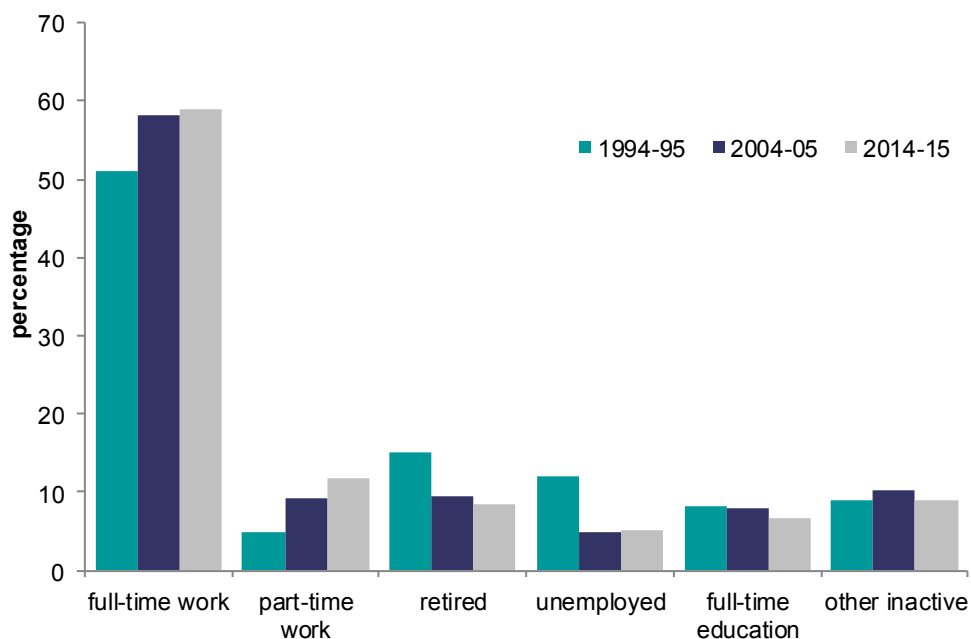
⁴ People were asked about the length of their current spell in the private rented sector. This figure will therefore exclude previous periods of time spent in the private rented sector.

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- 1.18 The proportion of households with dependent children increased in the 10 years between 2004-05 and 2014-15. In 2004-05, 25% of private renters were either couples or lone parents with dependent children; by 2014-15 this figure had increased to 36%, Annex Table 1.2.
 - 1.19 Of all privately renting households, 16% were lone parents with either dependent or independent children, Annex Table 1.2. Most (92%) of these lone parents were single mothers, Annex Table 1.8.
 - 1.20 In 2014-15, 18% of all one person households in the private rented sector were people aged over 65. This is a similar figure to that in 2004-05, Annex Table 1.9.
 - 1.21 Over the last 10 years the proportion of single person households that were in the youngest age group has decreased. In 2004-05, 19% of single person households were occupied by a person aged 16-24. In 2014-15, this figure had dropped to 7%.
 - 1.22 Over the same period, the proportion of couples with dependent children that were aged 25-34 has increased. In 2004-05, 33% of privately renting couples with dependent children were aged 25-34. In 2014-15 this figure had increased to 43%.

Economic activity and income

- 1.23 The mean gross weekly income of privately renting households (the HRP and their partner) was £564 per week. This is higher than social renters' gross weekly income, which was £323, Live Table FA3101.
- 1.24 The majority of private renters were in work, though 5% were unemployed. In 2014-15, 59% of household reference people in the private rented sector were in full-time employment, 12% were working part-time and 9% were retired. Private renters in full-time education made up 7% of privately renting households, Annex Table 1.2.
- 1.25 The proportion of private renters in full-time and part-time employment has increased since 1994-95, from 56% to 71%. Over the same period, the proportion of private renters who were unemployed decreased from 12% in 1994-95 to 5% in 2014-15. The proportion of private renters who were retired also decreased from 15% in 1994-95 to 9% in 2014-15.

Figure 1.3: Economic activity of private renters, 1994-95, 2004-05 and 2014-15



Base: all private renters

Note: underlying data are presented in Annex Table 1.2

Sources:

1994-95 and 2004-05: Survey of English Housing;

2014-15: English Housing Survey, full household sample

- 1.26 Between 1994-95 and 2014-15, household incomes have risen due to inflation as well as real growth in earnings. It is therefore more appropriate to compare relative income of private renters to the overall population over the period as opposed to actual income levels. All households have been divided into five equal groups based on the total weekly income of the HRP and partner (i.e. those in the bottom 20%, the next 20% and so on). These groups are known as quintiles.
- 1.27 In 2014-15, 24% of private renters were in the lowest income quintile, and 12% were in the highest, Annex Table 1.2⁵.
- 1.28 Over the last 20 years, the proportion of private renters in the lowest quintile has decreased from 34% in 1994-95 to 24% in 2014-15, while the proportion of private renters in the second and third income quintiles has increased from a total of 38% to 47%. Over the same period, the proportion in the highest quintile has not seen significant change.

⁵ Due to differences between the English Housing Survey and its predecessor, the Survey of English Housing, it is not possible to produce exact quintiles for the 1994-95 and 2004-05 survey years. The quintile boundaries used for this analysis are the closest approximation possible. In addition, there is a higher proportion of missing income data on these earlier survey years, where people have not provided this information.

Health and disability

- 1.29 A very small proportion (4%) of private renters reported that either they or their partner were registered disabled in 2014-15. This was a lower than the proportion in both the social rented (16%) and owner occupier (6%) sectors, Annex Table 1.10.
- 1.30 About a quarter (22%) of privately renting households reported that somebody in the household had a long-term illness or disability. By comparison, 50% of socially renting households said that somebody in the household has a long term illness or disability, Annex Table 1.11.
- 1.31 The proportion of private rented households including someone with a long-term limiting illness increased from 17% in 1994-95 to 22% in 2014-15, Annex Table 1.2.

Chapter 2

Satisfaction with housing

- 2.1 This chapter covers private renters' satisfaction with housing. It describes private renters' satisfaction with both tenure and accommodation, and explores how these compare with households in other tenures as well as how they have changed over time. Levels of satisfaction with tenure are compared across 2004-05 and 2014-15 as data are not available for 1994-95. For satisfaction with accommodation, three time points are discussed: 1994-95, 2004-05 and 2014-15.
- 2.2 To get a picture of how private renters' satisfaction with tenure varies across different socio-economic groups, this chapter explores how satisfaction with tenure is impacted by age, employment status and income.

Satisfaction with tenure

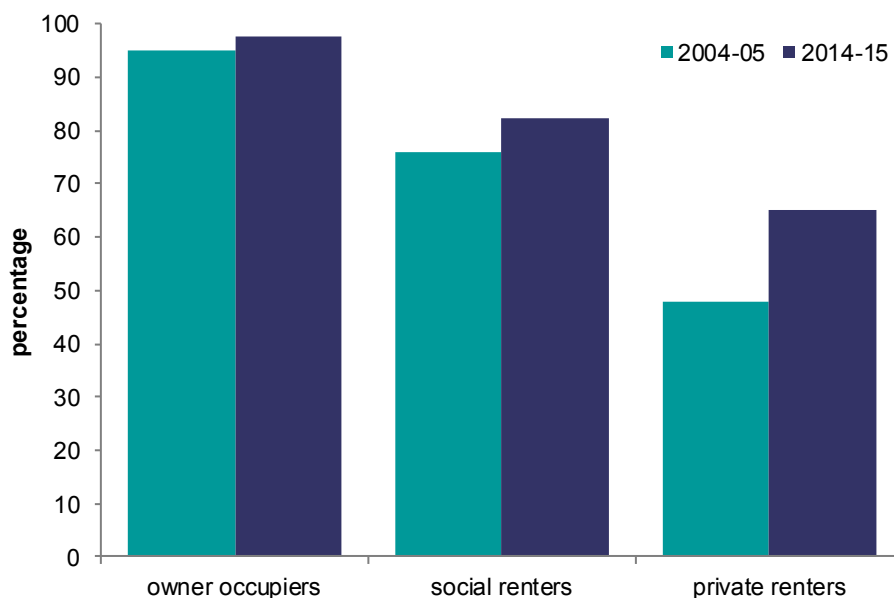
- 2.3 In 2014-15, all households were asked how satisfied they were with their current tenure, on a scale ranging from 'very dissatisfied' to 'very satisfied'. This chapter takes those who answered either 'very satisfied' or 'fairly satisfied' as being satisfied with their tenure.
- 2.4 In 2004-05, respondents were asked about their satisfaction with their tenure in a slightly different way: they were asked to rank their agreement with the statement that their tenure type 'is a good way of occupying a home'. When presenting 2004-05 findings, this chapter takes those who answered either 'strongly agree' or 'fairly agree' as being satisfied with their tenure.
- 2.5 Given the difference in how satisfaction with tenure was asked across survey years, 2004-05 and 2014-15 comparisons should be treated with caution.

Tenure comparison

- 2.6 The proportion of households satisfied with their tenure was lower in the private rented sector than in any other tenure type. In 2014-15, 65% per cent of private renters were satisfied with their current tenure, compared with 98% of owner occupiers and 82% of social renters, Annex Table 2.1.
- 2.7 All three tenures have seen an increase in satisfaction with tenure in the last 10 years. However, the private rented sector has seen the greatest increase, from 48% in 2004-05 to 65% in 2014-15. In comparison, the proportion of owner occupiers satisfied with their tenure increased from 95% to 98%, while

the proportion of social renters satisfied with their tenure increased from 76% to 82%, Figure 2.1.

Figure 2.1: Satisfaction with tenure, by tenure, 2004-05 and 2014-15



Base: all households

Note: underlying data are presented in Annex Table 2.1

Sources:

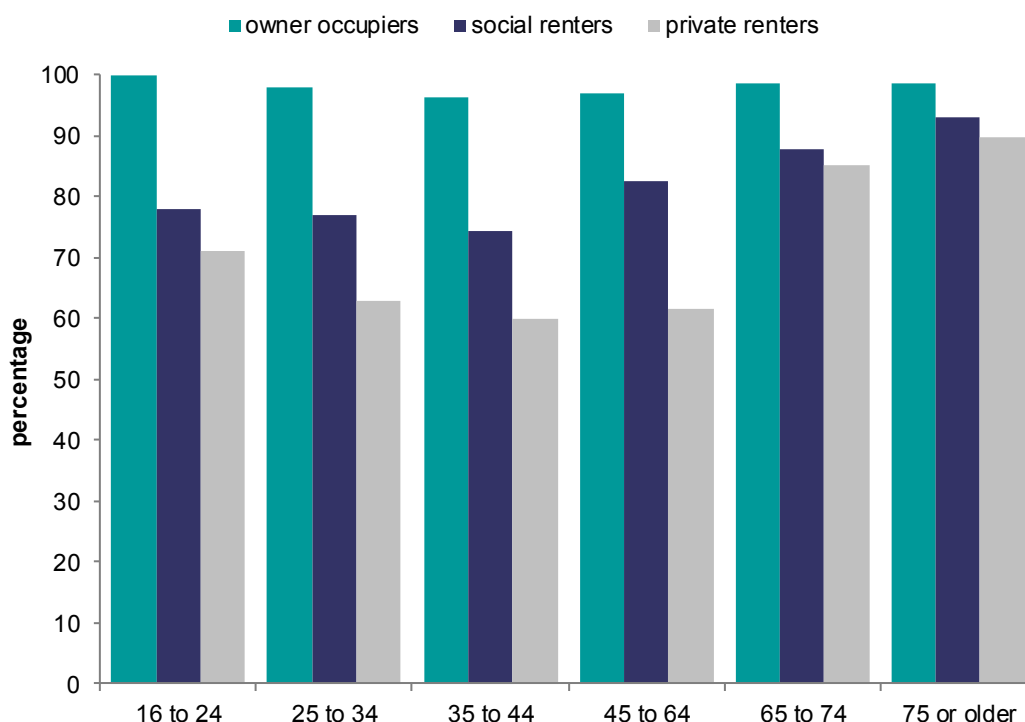
2004-05: Survey of English Housing

2014-15: English Housing Survey, full household sample

Age

- 2.8 Older private renters tended to be most satisfied with their tenure, while private renters in the middle age categories were least satisfied: 90% of private renters aged 75 or older cited feeling satisfied compared with 60% of 35-44 year-olds and 71% of 16-24 year olds, Figure 2.2.
- 2.9 Similarly, social renters in the older age categories were most satisfied with their tenure, while social renters in the middle age categories were least likely to be satisfied: 93% of social renters aged 75 or older were satisfied with their tenure, compared with 74% of 35-44 year-olds and 78% of 16-24 year olds.
- 2.10 Among owner occupiers, those in the youngest age group were most satisfied (100% of 16-24 year-olds), followed by owner occupiers in the oldest two age brackets (99% of those aged 65-74 and 75 or older), while those aged 35-44 were least satisfied (96%), Figure 2.2.

Figure 2.2: Satisfaction with tenure by tenure and age, 2014-15



Base: all households

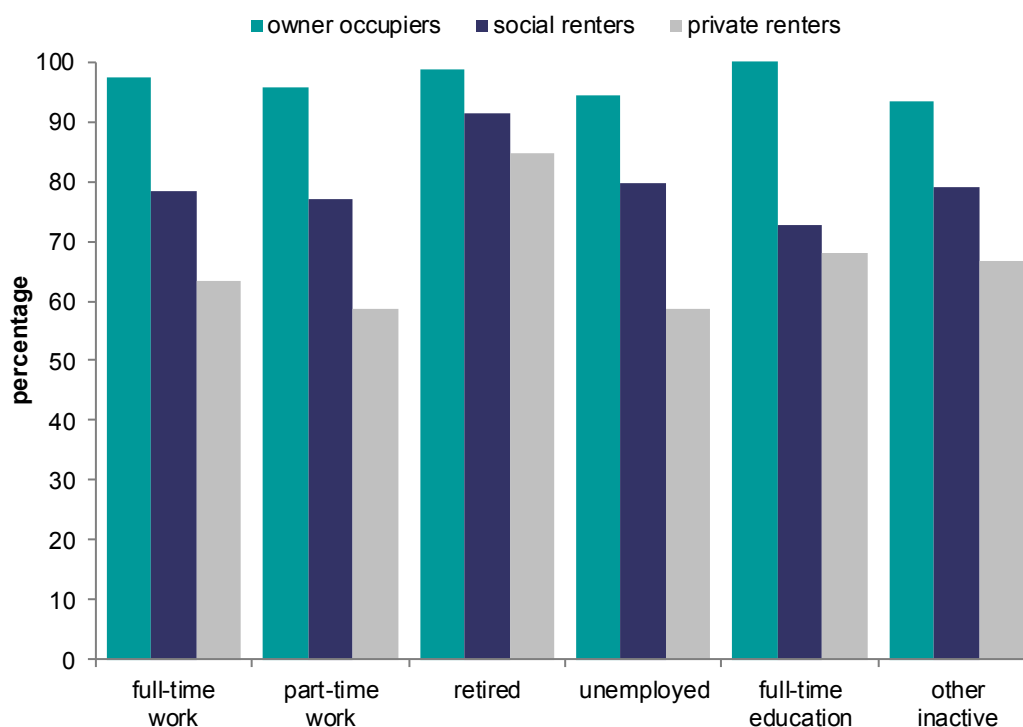
Note: underlying data are presented in Annex Table 2.2

Source: English Housing Survey, full household sample

Economic activity

- 2.11 Private renters who were unemployed or in part-time work were the least satisfied with tenure. Of those private renters in part-time work, 59% were satisfied with their tenure. Equally, 59% of unemployed private renters were satisfied, Figure 2.3.
- 2.12 Retired private renters were most likely to be satisfied with their tenure than any other economic activity group (85%).
- 2.13 Among owner occupiers, those in full-time education had the highest proportion of households satisfied with their tenure (100%). Of owners who were retired, 99% said they were satisfied with their tenure. Of those who were otherwise economically inactive, 93% were satisfied. Of employed owner occupiers, 97% of those in full-time, and 96% of those in part-time employment were satisfied.
- 2.14 Among social renters, those who were retired were more likely to be satisfied with their tenure than any other economic group (91%). By comparison, 80% of those who were unemployed and 79% of otherwise economically inactive renters said they were satisfied with their tenure. Of those in work, 78% of those in full-time, and 77% of those in part-time work reported satisfaction.

Figure 2.3: Satisfaction with tenure by tenure and employment status, 2014-15



Base: all households

Note: underlying data are presented in Annex Table 2.3

Source: English Housing Survey, full household sample

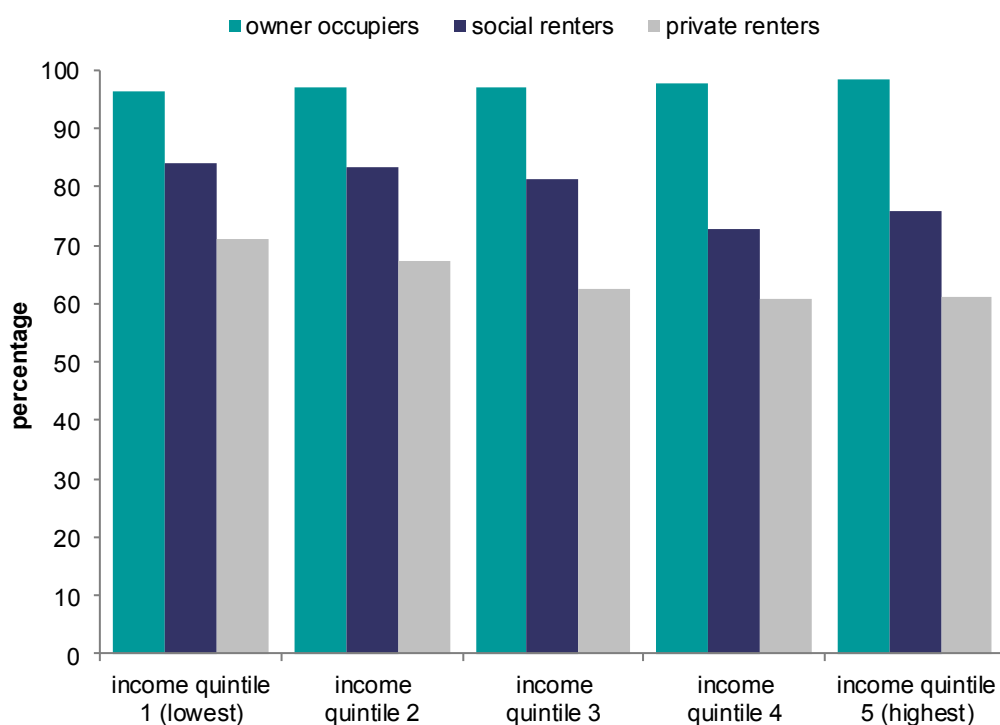
Income

- 2.15 Satisfaction with tenure among private renters decreased as income increased, from 71% of private renters in the lowest quintile⁶, to 61% of those in each of the highest two income quintiles, Figure 2.4.
- 2.16 Among social renters, as with private renters, satisfaction decreased as income increased, with 84% of those in the lowest quintile citing feeling satisfied compared with 73% of social renters in the fourth highest quintile⁷.
- 2.17 Conversely, among owner occupiers, the proportion of those satisfied with their tenure increased slightly with income; 96% of owner occupiers in the lowest income quintile said that they felt satisfied with their tenure compared with 98% of those in the highest income quintile.

⁶ See Glossary for more description of income quintiles

⁷ sample sizes were too small to compare to the fifth highest quintile

Figure 2.4: Satisfaction with tenure by tenure and income, 2014-15



Base: all households

Note: underlying data are presented in Annex Table 2.4

Source: English Housing Survey, full household sample

Satisfaction with accommodation

2.18 Across tenures, owner occupiers were more likely to be satisfied with their current accommodation than all renters, at 95%. Among renters, 82% of private renters and 80% of social renters said they were satisfied. There was no significant difference in levels of satisfaction with accommodation between social and private renters, Annex Table 2.5.

2.19 Since 1994-95 there has been little change in the proportion of each tenure who were satisfied with their accommodation. The proportion of owner occupiers satisfied with their accommodation increased by 2 percentage points. Among social renters the proportion of satisfaction households dropped by 3 percentage points. There was no significant change in the proportion of private renters satisfied with their accommodation, Figure 2.5.

Figure 2.5: Satisfaction with accommodation by tenure type, 1994-95, 2004-05, 2014-15



Base: all households

Note: underlying data are presented in Annex Table 2.5

Sources:

1994-95 and 2004-05: Survey of English Housing;

2014-15: English Housing Survey, full household sample

Chapter 3

Tenancy details

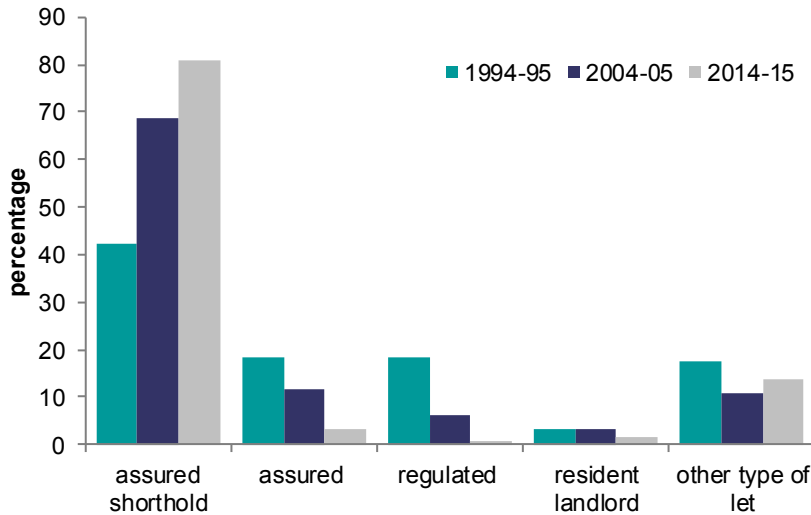
- 3.1 This chapter discusses tenancy details, including issues such as security and barriers to movement. It also explores the perceived transparency of fees and whether they hinder movement to new accommodation. Finally, the chapter covers tenancy deposits and private renters' satisfaction with their landlord.
- 3.2 Where possible, comparisons are made across three data points: 1994-95, 2004-05 and 2014-15. Data are not available for these years on tenancy fees where the year of comparison is 2009-10. For deposit information, the latest figures are compared to 2011-12 when the questions were last asked on the EHS. Data on satisfaction with landlord are available for 2004-05, but not 1994-95.

Tenancy type and duration

- 3.3 In 2014-15, the majority of private renters (81%) had an Assured Shorthold Tenancy (AST), Figure 3.1. The 1996 Housing Act made ASTs the default tenancy for the private rented sector. They grant the right of occupancy, usually for at least six months and following that, a minimum two months' notice period.
- 3.4 Among the 19% of private renters who did not have an AST, 3% had an Assured Tenancy. Before the introduction of ASTs, Assured Tenancies were the default tenancy. They provide lifetime security.
- 3.5 Prior to 1988, the standard tenancy type offered in the private rental sector was a Regulated Tenancy. This comprised a regulated rent and lifetime security of tenure and succession rights. By 2014-15, just 1% of private renters held a Regulated Tenancy.
- 3.6 In 2014-15, a small proportion (2%) of private renters had a resident landlord (where the landlord rents out a room or rooms in a property in which they themselves also live). Less than 1% of private renters let from an educational institution and 13% had an 'other type of let'.
- 3.7 Given the changes in the types of tenancies offered, it is not surprising that the types of tenancies held by private renters have changed in the last 20 years. Between 1994-95 and 2014-15, the proportion of private renters with an AST almost doubled from 42% to 81%. Over the same period, the

proportion of private renters that had an Assured Tenancy dropped from 18% to 3%.

Figure 3.1: Type of tenancy, 1994-95, 2004-05 and 2014-15



Base: all private renters

Notes:

- 1) underlying data are presented in Annex Table 3.1
- 2) other type of let includes those let by educational institution

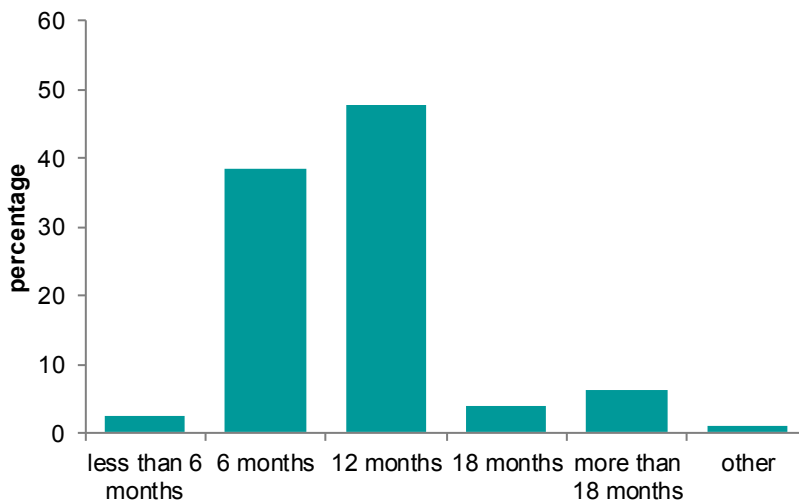
Sources:

2014-15: English Housing Survey, full household sample

1994-95 and 2004-05: Survey of English Housing

3.8 In 2014-15, most private renters had an initial tenancy agreement of six or 12 months; 48% had an agreement of 12 months and 39% of six months. A further 4% had a tenancy agreement lasting 18 months, while 6% had one lasting more than 18 months. Just 2% had an initial tenancy agreement lasting less than six months, Figure 3.2.

Figure 3.2: Length of initial tenancy agreement, 2014-15



Base: all private renters

Note: underlying data are presented in Annex Table 3.2

Source: English Housing Survey, full household sample

Notice period

3.9 In 2014-15, 59% of privately renting households said that their notice period gives them enough time to move on and find a new place to live, 24% said that it was possibly too short to be able to find a new place to live and 18% felt that their notice period was definitely too short, Annex Table 3.3.

Tenancy fees

3.10 Private renters were asked whether they were charged a fee (excluding any deposit) by a landlord or letting agency in their tenancy: 40% said that they were, up from 34% in 2009-10, Annex Table 3.4.

3.11 When asked what type of fee(s) they had paid, 65% of private renters said they paid an admin fee, 33% paid a finders' fee, 7% paid a non-returnable holding fee, 5% paid a returnable holding fee and 4% paid an 'other fee', Figure 3.3.

Figure 3.3: Type of fee(s) paid to landlord or letting agency, 2014-15



Base: All private renters who were charged a landlord or agency fee for current accommodation

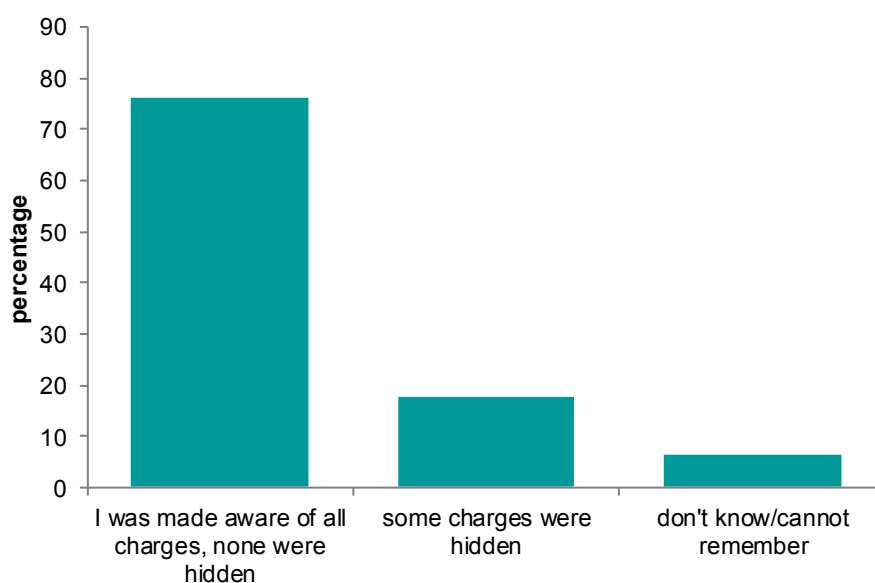
Note: underlying data are presented in Annex Table 3.5

Source: English Housing Survey, full household sample

3.12 The mean average fee amount paid in 2014-15 was £223, while the median was £200. In 2009-10, the mean average fee was £196, while the median was £125, Annex Table 3.6.

- 3.13 When private renters were asked whether fees would affect their decision to move, 32% said that they would not make a difference, 35% said that it would be something they would have to think about and 34% said that it would stop them moving to a new home, Annex Table 3.7.
- 3.14 When asked whether the agent/landlord made them aware of all of the upfront fees before they started viewing their property or properties, 76% of private renters who were charged a fee said that they were made aware of all upfront fees, with none being hidden. A further 18% said that some charges were hidden and 6% said that they did not know, Figure 3.4.

Figure 3.4: Awareness of upfront fees, 2014-15



Base: All private renters who were charged a landlord or agency fee for current accommodation

Note: underlying data are presented in Annex Table 3.8

Source: English Housing Survey, 2014-15, full household sample

Tenancy deposits

- 3.15 In 2014-15, 74% of respondents said that they or the HRP paid a deposit when they moved into their current accommodation, Annex Table 3.9. Among those who had paid a deposit, 62% said that it was protected under one of the government authorised tenancy deposit schemes⁸, Annex Table 3.10 .
- 3.16 Among those with an Assured Shorthold Tenancy, 64% said that their deposit was protected, while 11% said that it was not protected. Of this group, 25% said that they did not know, Annex Table 3.11.

⁸ All tenancy deposits paid by Assured Shorthold tenants must be protected in a government-backed scheme. The landlord must do this within 30 days of receiving the deposit. The purpose of the scheme is to ensure that the tenant is protected by getting back what they are entitled to at the end of the scheme.

Previous deposits

- 3.17 All householders who had previously been private renters (including those currently in other tenure types) were asked whether they had their deposit returned on a previous tenancy.
- 3.18 Of all those who had previously paid a deposit on a privately rented tenancy, 62% said that they had the deposit returned in full, 23% had it returned in part, 10% did not have it returned and 4% did not know/could not remember, Annex Table 3.12.
- 3.19 Between 2011-12 and 2014-15 there was no significant change in the proportion of households whose previous deposit was returned. In 2011-12, 63% of households had their previous deposit returned in full, 20% had it returned in part and 14% not have their deposit returned.

Satisfaction with landlord

- 3.20 Overall, 74% of private renters were satisfied with the housing services provided by their landlord, while 14% were dissatisfied and a further 12% were neither satisfied nor dissatisfied⁹, Annex Table 3.13.
- 3.21 The proportion of those satisfied with the housing services provided by their landlord/freeholder decreased from 77% in 2004-05.
- 3.22 Of the private renters who did not have to pay any landlord or agency fees, 77% were satisfied with the services provided by their landlord, compared with 69% of those who did have to pay landlord or agency fees, Annex Table 3.14.
- 3.23 Of the private renters whose agent or landlord made them aware of all upfront fees before starting to view their properties, 73% said that they were satisfied with the services provided by their landlord, compared with 56% of those who said that some charges were hidden, Annex Table 3.15.

⁹ The category: 'Question not applicable - Landlord not responsible for maintenance' has been removed from these analyses

Chapter 4

Accommodation type and characteristics

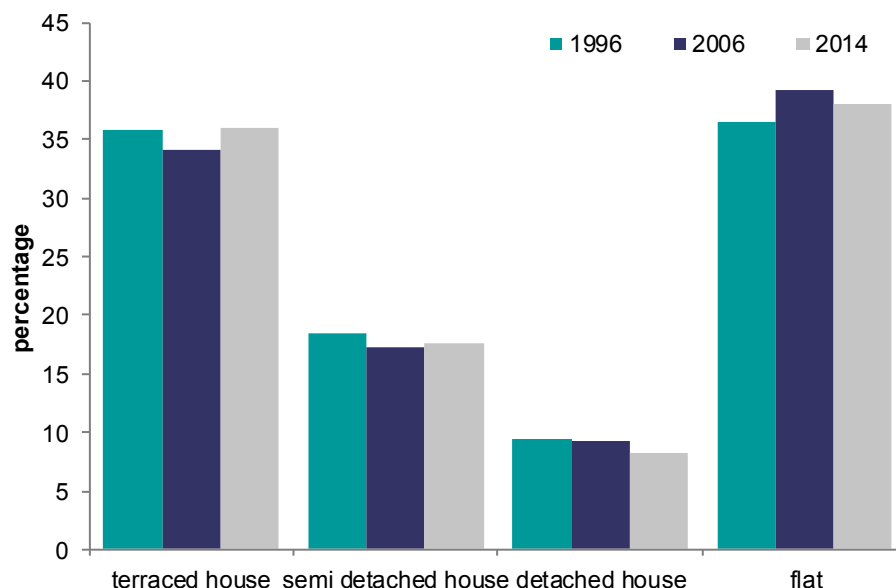
4.1 This chapter focuses specifically on the types and housing condition of occupied homes in the private rented sector, and how these characteristics have changed over time. It also examines who was responsible for maintaining and repairing these homes and the tenant satisfaction with the work undertaken by (or on behalf of) the landlord. The analysis for this chapter uses 1996, 2006 and 2014 paired physical and interview survey data except the section on repairs and maintenance which uses data from the 2006-07 and 2014-15 interview surveys.

Dwelling characteristics

Types of privately rented homes

4.2 In 2014, the most common types of homes for private renters were flats (38%) and terraced homes (36%). Relatively few resided in detached houses (8%). These findings were very similar in both 1996 and 2006, Figure 4.1.

Figure 4.1: Type of homes, 1996, 2006 and 2014



Base: all private rented tenants

Note: underlying data are presented in Annex Table 4.1

Sources:

1996 and 2006: English House Condition Survey, household sub-sample

2014: English Housing Survey, household sub-sample

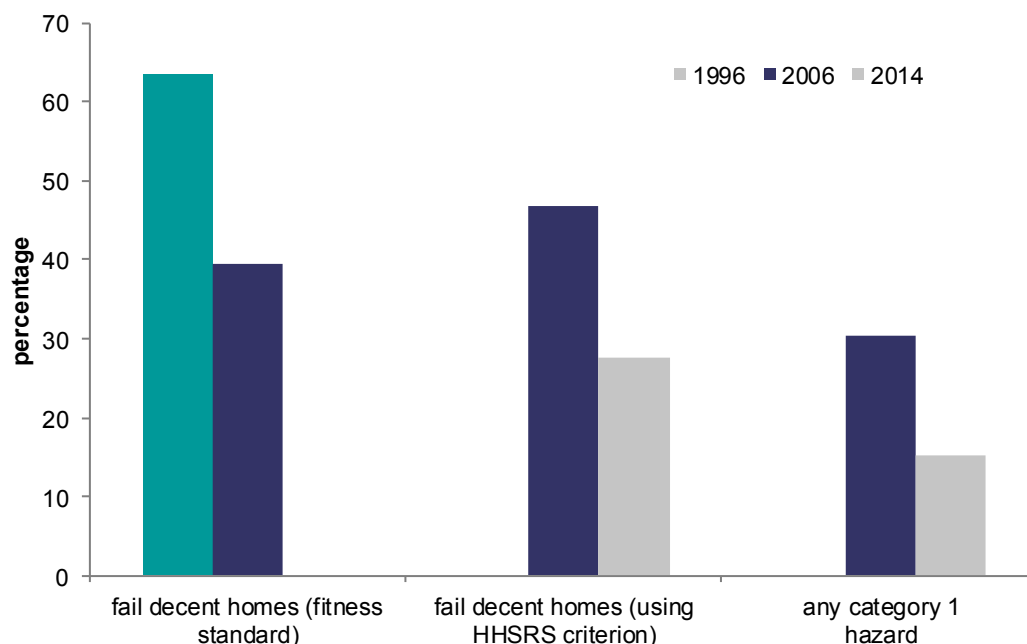
The condition of private rented homes

- 4.3 One key indicator of housing condition is whether a home meets the government's Decent Homes standard. Details of the criteria are given in the glossary. There is no consistent measure to estimate the incidence of non-decent housing throughout this period. This is because the definition of Decent Homes was updated in 2006 when the Fitness Standard was replaced by the Housing Health and Safety Rating System (HHSRS) as the statutory minimum standard for housing¹⁰. Therefore, this analysis uses comparable 1996 and 2006 data using the Fitness Standard to show the incidence of non-decent homes for the 1996 to 2006 period¹¹.
- 4.4 Despite the inconsistency in the measurement of the Decent Homes standard we can conclude that an increasing proportion of private renters are living in better housing conditions. From 1996 to 2006, the proportion of private renters living in a non-decent home fell from 63% to 40%. Under the new definition of Decent Homes, the proportion of these renters living in non-decent housing fell from 47% in 2006 to 28% in 2014. This improvement in part reflects the growth in new homes entering the sector, Figure 4.2.
- 4.5 Despite this marked improvement, the prevalence of non-decent housing continued to be higher for private renters (28%) compared with owner occupiers (18%) and social renters (14%), Annex Table 4.2.
- 4.6 Other tenures have also experienced reductions in the proportion of non-decent homes. In 1996, just over half (52%) of social renters lived in non-decent housing, but this proportion had fallen to 27% by 2006. Under the new HHSRS definition, 28% of social renters lived in non-decent homes in 2006 falling to 14% in 2014. In 1996, 39% of owner occupiers lived in a non-decent home falling to 23% by 2006. Under the new HHSRS definition of non-decency, 34% of owner occupiers lived in a home that failed to meet the standard in 2006, falling to 18% in 2014, Annex Table 4.2.
- 4.7 Despite improvement in the proportion of non-decent housing within the private rented stock, due to the increasing size of the sector, the number of private renters who lived in relatively poorer housing did not change greatly over this period. Around 1.2 million private renters lived in a non-decent home in 1996; the same as in 2014.

¹⁰ For details of the change in criteria see <http://researchbriefings.files.parliament.uk/documents/SN01917/SN01917.pdf>

¹¹ The Decent Homes figures using the HHSRS methodology relate to the 15 hazards collected by EHS since 2006

Figure 4.2: Proportion of homes in the private rented sector failing the Decent Homes standard and having any Category 1 HHSRS hazard, 1996, 2006 and 2014



Base: all private rented tenants

Notes:

1) underlying data are presented in Annex Tables 4.2 and 4.3

2) in 2006 only 15 HHSRS hazards were assessed by the EHCS so comparable hazards have been included for the EHS 2014 analysis

Sources:

1996 and 2006: English House Condition Survey, household sub-sample;

2014: English Housing Survey, household sub-sample

4.8 In terms of dwelling safety¹² the proportion of private renters who lived in homes with a serious hazard halved from 2006 to 2014 (30% to 15%), Figure 4.2. Nonetheless the number of these households living in a home with a serious HHSRS hazard did not improve greatly from 2006, Annex Table 4.3.

4.9 The proportion of homes with these serious Category 1 hazards has always been lower for social renters; 12% in 2006 falling to 6% in 2014. Owner occupiers were also less likely to live in homes with Category 1 hazards compared with private renters in both 2006 (22%) and 2014 (11%).

4.10 The overall improvement in the condition of private rented homes is due a number of factors which include;

- the growth of newly built homes entering the private rented sector.

¹² Measured by the HHSRS, a criterion for the Decent Homes standard

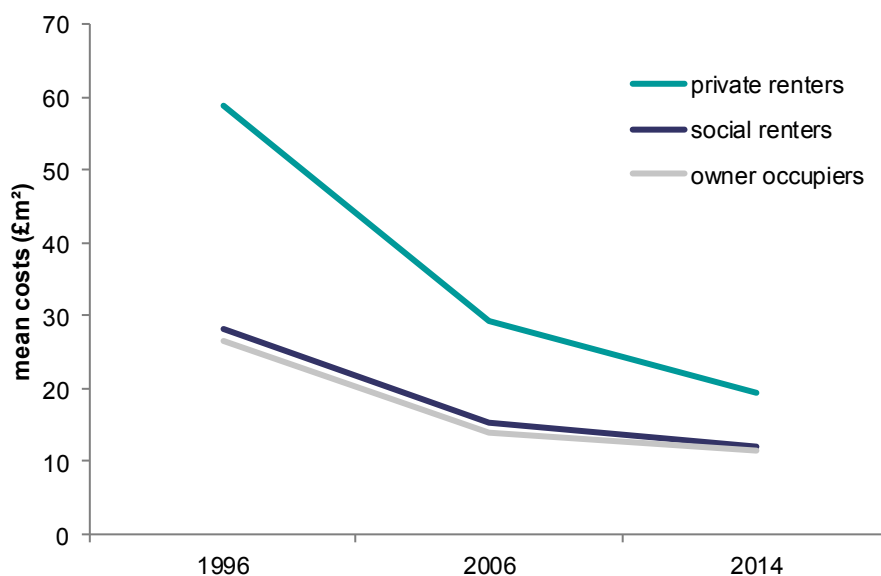
-
- the growing installation of energy efficiency measures and the overall improvement in energy efficiency among privately rented homes. These promote thermal comfort and reduce the risks of excess cold.
 - improvement in day-to-day maintenance work undertaken by landlords (see analysis below on disrepair)
 - local authority enforcement action against private landlords where serious HHSRS hazards exist.

4.11 Another key indicator of housing condition is level of disrepair at the dwelling. For this analysis, an index of disrepair, referred to as 'standardised basic repair cost'¹³ has been used to compare repair costs for private rented homes over time. Since 1996, the average basic repair cost for the homes of private renters has reduced by 67% from £59/m² to £19/m², indicating significant improvements in day-to-day maintenance of homes by landlords, Figure 4.3.

4.12 The level of disrepair in the homes of private renters has, however, remained higher throughout the 1996 to 2014 period compared with other tenures, although the difference in average costs for the homes of private renters and other households had reduced. In the 1996 average level of basic disrepair for owner occupiers and social renters was £26m² and £28m² respectively and this fell to £12m² in 2014 for both tenures.

¹³ See the glossary for further information

Figure 4.3: Average basic standardised repair costs by tenure of household, 1996, 2006 and 2014 (at 2014 prices)



Base: all households

Note: underlying data are presented in Annex Table 4.4

Sources:

1996 and 2006: English House Condition Survey, household sub-sample

2014: English Housing Survey, household sub-sample

Responsibility for repairs in the private rented sector

- 4.13 In 2014-15, for around two thirds of private rented tenants (64%), repairs and maintenance were the responsibility of the landlord. For a further 20%, responsibility lay with the property manager or lettings agent. A far smaller proportion of tenants (7%) indicated that they did the repair work themselves. The remaining 10% of responses fell into other categories, Annex Table 4.5.
- 4.14 Two thirds (66%) of private renters were satisfied with the repairs and maintenance done on their home. Satisfaction was highest when the landlord was responsible for the work (76%); the equivalent figure for estate/managing agents was 55%, Annex Table 4.6.
- 4.15 The most common reasons given for dissatisfaction with repairs and maintenance were the landlord not bothering to do the work (32%) or the landlord being too slow to get things done (31%), Annex Table 4.7.
- 4.16 Broadly the same picture was seen in 2006-07 when a similar proportion of private renters reported that the maintenance of their property (inside, 82% and outside, 89%) was carried out by their landlord or a property manager or letting agent¹⁴, Annex Table 4.8.

¹⁴ These are grouped as one category in 2006 and therefore cannot be analysed separately.

4.17 There were similar rates of satisfaction for repairs service in both 2014-15 and 2006-07. In 2006-07, 67% of private renters were satisfied or very satisfied with repairs while 20% were dissatisfied or very dissatisfied. These results suggest that there is not a marked difference in how private renters feel about repairs over this time period, Annex Table 4.9.

Technical notes and glossary

Technical notes

1. Results for most of this report are presented for '2014-15' and are based on fieldwork carried out between April 2014 and March 2015 on a sample of 13,174 households. Throughout the report, this is referred to as the 'full household sample'.
2. Some results in the fourth chapter of the report, which relate to the physical dwelling, are presented for '2014' and are based on fieldwork carried out between April 2013 and March 2015 (a mid-point of April 2014). The sample comprises 11,851 occupied dwellings where a physical inspection was carried out and where an interview with the household was also undertaken. Throughout the report, this sample is referred to as the 'household sub-sample'.
3. Where the numbers of cases in the sample are too small for any inference to be drawn about the national picture, the cell contents are replaced with a 'u'. This happens where the cell count is less than five. When percentages are based on a row or column total with unweighted total sample size of less than 30, the figures are italicised. Figures in italics are therefore based on a small sample size and should be treated as indicative only.
4. Where comparative statements have been made in the text, these have been significance tested to a 95% confidence level. This means we are 95% confident that the statements we are making are true.
5. Additional annex tables, including the data underlying the figures and charts, are published on the website: <https://www.gov.uk/government/collections/english-housing-survey>, alongside many supplementary tables that are too numerous to include in our reports. Further information on the technical details of the survey, and information and past reports on the Survey of English Housing and the English House Condition Survey, can also be accessed via this link.

Glossary

Assured shorthold private tenancy: This type of tenancy is where the landlord can regain possession of the property six months after the beginning of the tenancy, as long as they provide the tenant with two months' notice.

Assured private tenancy: This type of tenancy is where the tenant has the right to remain in the property unless the landlord can prove they have grounds for

possession. The landlord does not have an automatic right to repossess the property when the tenancy comes to an end.

Decent home: A home that meets all of the following four criteria:

- it meets the current statutory minimum standard for housing as set out in the Housing Health and Safety Rating System (HHSRS – see below).
- it is in a reasonable state of repair (related to the age and condition of a range of building components including walls, roofs, windows, doors, chimneys, electrics and heating systems).
- it has reasonably modern facilities and services (related to the age, size and layout/location of the kitchen, bathroom and WC and any common areas for blocks of flats, and to noise insulation).
- it provides a reasonable degree of thermal comfort (related to insulation and heating efficiency).

The detailed definition for each of these criteria is included in *A Decent Home: Definition and guidance for implementation*, Department for Communities and Local Government, June 2006¹⁵.

Dependent children: Any person aged 0 to 15 in a household (whether or not in a family) or a person aged 16 to 18 in full-time education and living in a family with his or her parent(s) or grandparent(s). It does not include any people aged 16 to 18 who have a spouse, partner or child living in the household.

Dwelling: A unit of accommodation which may comprise one or more household spaces (a household space is the accommodation used or available for use by an individual household). A dwelling may be classified as shared or unshared. A dwelling is shared if:

- the household spaces it contains are ‘part of a converted or shared house’, or
- not all of the rooms (including kitchen, bathroom and toilet, if any) are behind a door that only that household can use, and
- there is at least one other such household space at the same address with which it can be combined to form the shared dwelling.

Dwellings that do not meet these conditions are unshared dwellings.

The EHS definition of dwelling is consistent with the Census 2011.

Dwelling age: The date of construction of the oldest part of the building.

¹⁵ <https://www.gov.uk/government/publications/a-decent-home-definition-and-guidance>

Dwelling type: Dwellings are classified, on the basis of the surveyor's inspection, into the following categories:

- **small terraced house:** a house with a total floor area of less than 70m² forming part of a block where at least one house is attached to two or more other houses. The total floor area is measured using the original EHS definition of usable floor area, used in EHS reports up to and including the 2012 reports. That definition tends to yield a smaller floor area compared with the definition that is aligned with the Nationally Described Space Standard and used on the EHS since 2013. As a result of the difference between the two definitions, some small terraced houses are reported in the 2014 Housing Stock Report as having more than 70m².
- **medium/large terraced house:** a house with a total floor area of 70m² or more forming part of a block where at least one house is attached to two or more other houses. The total floor area is measured using the original EHS definition of useable floor area which tends to yield a small floor area compared with the definition used on the EHS since 2013.
- **end terraced house:** a house attached to one other house only in a block where at least one house is attached to two or more other houses.
- **mid terraced house:** a house attached to two other houses in a block.
- **semi-detached house:** a house that is attached to just one other in a block of two.
- **detached house:** a house where none of the habitable structure is joined to another building (other than garages, outhouses etc.).
- **bungalow:** a house with all of the habitable accommodation on one floor. This excludes chalet bungalows and bungalows with habitable loft conversions, which are treated as houses.
- **converted flat:** a flat resulting from the conversion of a house or former non-residential building. Includes buildings converted into a flat plus commercial premises (such as corner shops).
- **purpose built flat, low rise:** a flat in a purpose built block less than six storeys high. Includes cases where there is only one flat with independent access in a building which is also used for non-domestic purposes.
- **purpose built flat, high rise:** a flat in a purpose built block of at least six storeys high.

Economic status: Respondents self-report their situation and can give more than one answer.

-
- **working full-time/part-time:** full-time work is defined as 30 or more hours per week. Part-time work is fewer than 30 hours per week. Where more than one answer is given, 'working' takes priority over other categories (with the exception that all those over State Pension Age (SPA) who regard themselves as retired are classified as such, regardless of what other answers they give).
 - **unemployed:** this category covers people who were registered unemployed or not registered unemployed but seeking work.
 - **retired:** this category includes all those over the state pension age who reported being retired as well as some other activity. For men the SPA is 65 and for women it is 60 if they were born before 6th April 1950. For women born on or after the 6th April 1950, the state pension age has increased incrementally since April 2010¹⁶.
 - **full-time education:** education undertaken in pursuit of a course, where an average of more than 12 hours per week is spent during term time.
 - **other inactive:** all others; they include people who were permanently sick or disabled, those looking after the family or home and any other activity.

On occasions, **full-time education** and **other inactive** are combined and described

Ethnicity: Classification according to respondents' own perceived ethnic group. **Ethnic minority background** is used throughout the report to refer to those respondents who do not identify as white.

Full time education: Full time education is education undertaken in pursuit of a course, where an average of more than 12 hours per week is spent during term time.

Gross annual income: The annual income of the household reference person and (any) partner. This includes income from private sources (regular employment, self-employment, government schemes, occupational pensions, private pensions and other private income), state benefits/allowances and tax credits, as collected on the EHS (this includes housing benefit/Local Housing Allowance but excludes council tax benefit and Support for Mortgage Interest) and interest from savings. It is a gross measure i.e. income before Income Tax or National Insurance deductions.

Household: One person or a group of people (not necessarily related) who have the accommodation as their only or main residence, and (for a group) share cooking facilities and share a living room or sitting room or dining area.

The EHS definition of household is slightly different from the definition used in the 2011 Census. Unlike the EHS, the 2011 Census did not limit household membership to people who had the accommodation as their only or main residence. The EHS included that restriction because it asks respondents about their second homes, the

¹⁶ For further information see: www.gov.uk/browse/working/state-pension

unit of data collection on the EHS, therefore, needs to include only those people who have the accommodation as their only or main residence.

Household reference person (HRP): The person in whose name the dwelling is owned or rented or who is otherwise responsible for the accommodation. In the case of joint owners and tenants, the person with the highest income is taken as the HRP. Where incomes are equal, the older is taken as the HRP. This procedure increases the likelihood that the HRP better characterises the household's social and economic position. The EHS definition of HRP is not consistent with the Census 2011, in which the HRP is chosen on basis of their economic activity. Where economic activity is the same, the older is taken as HRP, or if they are the same age, HRP is the first listed on the questionnaire.

Household type: The main classification of household type uses the following categories, some categories may be split or combined in different tables:

- **couple no dependent child(ren)** married/cohabiting couple with no dependent children or with independent child(ren) only.
 - **couple, no children**
 - **couple, independent child(ren) only**
- **couple with dependent child(ren)** married/cohabiting couple with dependent child(ren) – may also include independent child(ren).
- **lone parent with dependent child(ren)** lone parent family (one parent with dependent child(ren) – may also include independent child(ren).
- **other multi-person households:**
 - **lone parent, independent child(ren) only**
 - **other type of household** (includes flat sharers and households containing more than one couple or lone parent family)
- **one person:**
 - **one person aged under 60**
 - **one person aged 60 or over**

The married/cohabiting couple and lone parent household types (the first three categories above) may include one-person family units in addition to the couple/lone parent family.

Housing Benefit: A benefit that is administered by local authorities, which is designed to assist people who rent their homes and have difficulty meeting their housing costs. Council tenants on Housing Benefit receive a rent rebate which means that their rent due is reduced by the amount of that rebate. Private and social

housing tenants usually receive Housing Benefit (or rent allowance) personally, although sometimes it is paid direct to the landlord.

Housing Health and Safety Rating System (HHSRS): A risk assessment tool used to assess potential risks to the health and safety of occupants in residential properties in England and Wales. It replaced the Fitness Standard in April 2006.

The purpose of the HHSRS assessment¹⁷ is not to set a standard but to generate objective information in order to determine and inform enforcement decisions. There are 29 categories of hazard, each of which is separately rated, based on the risk to the potential occupant who is most vulnerable to that hazard. The individual hazard scores are grouped into 10 bands where the highest bands (A-C representing scores of 1,000 or more) are considered to pose Category 1 hazards. Local authorities have a duty to act where Category 1 hazards are present, and may take into account the vulnerability of the actual occupant in determining the best course of action.

For the purposes of the decent homes standard, homes posing a Category 1 hazard are non-decent on its criterion that a home must meet the statutory minimum requirements.

The EHS is not able to replicate the HHSRS assessment in full as part of a large scale survey. Its assessment employs a mix of hazards that are directly assessed by surveyors in the field and others that are indirectly assessed from detailed related information collected. For 2006 and 2007, the survey (the then English House Condition Survey) produced estimates based on 15 of the 29 hazards. From 2008, the survey is able to provide a more comprehensive assessment based on 26 of the 29 hazards. See the EHS Technical Note on Housing and Neighbourhood Conditions¹⁸ for a list of the hazards covered.

Income (equivalised): Household incomes have been 'equivalised', that is adjusted (using the modified Organisation Economic Co-operation and Development scale) to reflect the number of people in a household. This allows the comparison of incomes for households with different sizes and compositions.

The EHS variables are modelled to produce a **Before Housing Cost (BHC)** income measure for the purpose of equalisation. The BHC income variable includes:

Household Reference Person and partner's income from benefits and private sources (including income from savings), income from other household members, housing benefit, winter fuel payment and the deduction of net council tax payment.

An **After Housing Cost (AHC)** income is derived by deducting rent and mortgage payments from the BHC measure.

¹⁷ <https://www.gov.uk/government/organisations/department-for-communities-and-local-government/series/housing-health-and-safety-rating-system-hhsrs-guidance>

¹⁸ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/211302/Housing_and_Neighbourhood_Conditions.pdf

Income quintiles: All households are divided into five equal groups based on their income (i.e. those in the bottom 20%, the next 20% and so on). These groups are known as quintiles. These can be used to compare income levels of particular groups to the overall population.

Independent children: any person aged over 18 or those aged 16-18 who are not in full-time education living in a family with his or her parent(s) or grandparent(s).

Long-term limiting illness: This is consistent with the core definition of disability under the Equality Act 2010. A person is considered to have a disability if they have a long-standing illness, disability or impairment which causes substantial difficulty with day-to-day activities. This is variously referred to throughout the report as long-term limiting illness or disability, long-term illness or disability and long-term limiting disability.

Median income: the amount that divides the income distribution into two equal groups, half having income above that amount, and half having income below that amount.

Standardised basic repair costs: Basic repairs include urgent work required in the short term to tackle problems presenting a risk to health, safety, security or further significant deterioration plus any additional work that will become necessary within the next five years. See Chapter 5, Annex 5 of the Technical Report for more information about how these are calculated and assumptions made.

The standardisation of costs removes the effects of dwelling size and regional variations in prices. It uses standardised repair costs (£/m²) converted to 2014 prices using the Building Cost Information Service (BCIS) National Index. This rebasing of costs allows for a time series of comparative analysis of repair costs, since it removes the impact of building cost inflation or deflation.

Tenure: In this report, households are typically grouped into three broad categories known as tenures: owner occupiers, social renters and private renters. The tenure defines the conditions under which the home is occupied, whether it is owned or rented, and if rented, who the landlord is and on what financial and legal terms the let is agreed.

- **owner occupiers:** households in accommodation which they either own outright, are buying with a mortgage or as part of a shared ownership scheme.
- **social renters:** this category includes households renting from Local Authorities (including Arms' Length Management Organisations (ALMOs) and Housing Action Trusts) and Housing Associations, Local Housing Companies, co-operatives and charitable trusts.

A significant number of Housing Association tenants wrongly report that they are Local Authority tenants. The most common reason for this is that their home used

to be owned by the Local Authority, and although ownership was transferred to a Housing Association, the tenant still reports that their landlord is the Local Authority. There are also some Local Authority tenants who wrongly report that they are Housing Association tenants. Data from the EHS for 2008-09 onwards incorporate a correction for the great majority of such cases in order to provide a reasonably accurate split of the social rented category.

- **private renters:** this sector covers all other tenants including all whose accommodation is tied to their job. It also includes people living rent-free (for example, people living in a flat belonging to a relative).

Key differences between EHS and SEH data

Household Reference Person: From April 2001 the SEH, in common with other Government surveys, replaced the traditional concept of the "head of the household" (HOH) by "household reference person" (HRP). The HRP is defined as the "householder" (that is the person in whose name the accommodation is owned or rented). For joint householders (joint owners or joint tenants), the HRP is whoever has the highest income. If incomes are the same, the older person is defined as the HRP. Thus the HRP definition, unlike the old HOH definition, no longer gives automatic priority to male partners. The switch from HOH to HRP resulted in a lower proportion of male 'Heads'. For this reason, all figures based on the HRP (former HOH) for 1994-95 should be viewed with consideration when comparing them to 2004-05 and 2014-15.

Household type: The SEH household type variables are derived based on the eldest person in the household and this is different from the EHS household types variables which are derived based on the HRP. In most households this will not affect the final household type derivation and the SEH 1994-95 and SEH 2004-05 used in this report will be comparable to the EHS 2014-15. This different approach will only be an issue if there is more than one family unit in the household, but even in most of these cases if the eldest family unit is single and there are couples in the household, the household will still be coded as a couple therefore, there will only be a few inconsistencies between the two surveys, see Technical Report, chapter 5 for more details. The EHS 2014-15 household type variable `hhtype11` was recoded to match with SEH variable `hhcomp` in this report.

Income: The SEH collected income data based on the households estimate of their income within a band, respondents provided income in terms of either weekly, monthly or annual amounts. For joint income, responses were converted into a monetary value by taking the mid-point of each income band for the household reference person and partner if applicable. Where there was a missing response, the income variable was left as missing and excluded from the analysis. This was different to the EHS income data that was modelled using actual income values for the HRP and partner and factored in all income including benefits. Missing data is

modelled and here are no missing income values (see Technical Report, chapter 5 for more details). In this report, SEH income data was used for 1994-95 and 2004-05 and EHS income data was used for 2014-15.

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and Signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest.

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

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